



County Offices
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10 April 2024

In accordance with the powers granted by Regulation 8(1A) of the Schools Forum (England) Regulations this meeting will be held through remote means.

Lincolnshire Schools' Forum

A meeting of the Lincolnshire Schools' Forum will be held on **Thursday, 18 April 2024 at 1.00 pm as a Virtual - Online Meeting via Microsoft Teams** for the transaction of the business set out on the attached Agenda.

Access to the meeting is as follows:

Members of the Lincolnshire Schools' Forum and officers of the County Council supporting the meeting will access the meeting via Microsoft Teams.

Members of the public and the press may access the meeting via the following link: [Agenda for Lincolnshire Schools' Forum on Thursday, 18th April, 2024, 1.00 pm \(moderngov.co.uk\)](https://www.moderngov.co.uk) where a live feed will be made available on the day of the meeting.

Yours sincerely

Debbie Barnes OBE
Chief Executive

Membership of the Lincolnshire Schools' Forum

SCHOOLS' MEMBERS

Nursery (1)

Amy Stancer (Head Teacher, St Giles Nursery School, Lincoln)

Special (1)

1 vacancy

Primary Maintained (6)

Primary Maintained Head Teachers (3)

Callum Clay, (Head Teacher, Sleaford Church Lane Primary School)
2 vacancies

Primary Maintained Governors (3)

Alan Howe, (Governor, Sutton on Sea County Primary School)
Tony Stevens, (Governor, The Holt Primary School, Skellingthorpe)
1 vacancy

Secondary Maintained Head Teacher (1)

Michele Anderson (Head Teacher, Spalding High School)

Secondary Academies (7)

Secondary Academies Head Teachers (4)

Steven Baragwanath (Head Teacher, University Academy, Holbeach)
Philip Dickinson (Principal, Louth Academy)
Simon Pickett (Head Master, The King's School, Grantham)
1 vacancy

Secondary Academies Governors (3)

Professor Ken Durrands CBE, (Governor, The King's School, Grantham)
Andrew Everard (Chair of Governors, University Academy Long Sutton)
Jo Slesser (Governor, Carres Grammar School, Sleaford)

Primary Academies (5)

Primary Academies Head Teachers (3)

Gavin Booth (Head Teacher, Boston St Thomas' C E Primary School) **CHAIRMAN**
Chris Fitzpatrick (Head Teacher, Tall Oaks Academy Trust Ltd)
Tristan Revell (Head Teacher, Malcolm Sargent Primary School, Stamford)

Primary Academies Governors (2)

2 vacancies

Special Academies (2)

Special Academies Head Teacher (1)

Leandra Mason (Executive Head Teacher, Lincolnshire Wolds Federation)

Special Academies Governor (1)

Dr Stephen Hopkins (Trust Chair of Communities Inclusive Trust)

Alternative Provision Academy (1)

Josh Greaves (Deputy Chief Executive Officer, Wellspring Academy Trust) **VICE-CHAIRMAN**

NON-SCHOOLS' MEMBERS

Faith Groups (1)

Peter Tomlinson (Diocese of Lincoln)

Providers of 16 to 19 Education (1)

Heather Marks (Vice-Principal, Boston College)

Staff Trade Unions (1)

Andrew Watts (NEU)

Early Years Providers (1)

Julia Merivale (Trinity Day Nursery, Gainsborough)

**LINCOLNSHIRE SCHOOLS' FORUM AGENDA
THURSDAY, 18 APRIL 2024**

Item	Title	Pages
1	Apologies for absence/Replacement Members	
2	Declarations of Interest	
3	Minutes of the previous meeting on 18 January 2024	7 - 12
4	Chairman's Announcements	
5	Building Communities of Specialist Provision Strategy: Update <i>(To receive a report from Eileen McMorrow, Programme Manager – SEND and Inclusion, which provides an update on the Building Communities of Specialist Provision Strategy)</i>	13 - 26
6	Academies and Trust Update <i>(To receive a report from Mark Popplewell, Strategic Finance Lead – Children's Services, which provides information on the latest number of academies and pupils in academies and academy trusts)</i>	27 - 32
7	Lincolnshire Schools' Forum Work Programme <i>(This item provides the Schools' Forum with an opportunity to discuss potential items for future meetings, which will be subsequently included in the Work Programme)</i>	33 - 36

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Please note: for more information about any of the following please contact the Democratic Services Officer responsible for servicing this meeting

- Business of the meeting
- Any special arrangements

Contact details set out above.

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LINCOLNSHIRE SCHOOLS' FORUM 18 JANUARY 2024

PRESENT:

Josh Greaves (Deputy Chief Executive Officer, Wellspring Academy Trust) (Vice-Chairman, in the Chair)

Alan Howe (Governor, Sutton on Sea County Primary School), Anthony Stevens (Governor, The Holt Primary School, Skellingthorpe), Professor Ken Durrands CBE (Governor, The King's School, Grantham), Andrew Everard (Chair of Governors, University Academy Long Sutton), Jo Slessor (Governor, Carres Grammar School, Sleaford), Steve Baragwanath (Executive Principal, University Academy Holbeach), Philip Dickinson (Principal, Louth Academy), Simon Pickett (Head Master, The King's School, Grantham), Chris Fitzpatrick (Head Teacher, Tall Oaks Academy Trust), Tristan Revell (Head Teacher, Malcolm Sargent Primary School), Josh Greaves (Deputy Chief Executive Officer, Wellspring Academy Trust) (Vice-Chairman, in the Chair), Andrew Watts (NEU), Julia Merivale (Manager, Trinity Day Nursery) and Heather Marks (Vice-Principal, Boston College),

Officers in attendance:-

Elizabeth Bowes (Strategic Finance Manager, Schools Finance Team), Mark Popplewell (Head of Finance (Children's Services)), Martin Smith (Assistant Director for Children's Education), Emily Wilcox (Democratic Services Officer), Geraldine Willders (Head of Service - School Strategy), Kate Capel (Children's SEND Locality Manager), Sheridan Dodsworth (Head of SEND) and Geraldine O'Neill (Lead Consultant - Early Years Entitlement)

22 APOLOGIES FOR ABSENCE/REPLACEMENT MEMBERS

Apologies for absence had been received from Amy Stancer, Callum Clay, Michele Anderson, Gavin Booth, Lea Mason and Peter Tomlinson.

23 DECLARATIONS OF INTEREST

None were declared at this point in the meeting.

24 MINUTES OF THE PREVIOUS MEETING HELD ON 5 OCTOBER 2023

RESOLVED

That the minutes of the meeting held on 5 October 2023 be approved as a correct record.

25 SCHOOL FUNDING ARRANGEMENTS 2024/25

Consideration was given to a report by Strategic Finance Manager, Schools Finance Team which invited the Forum to consider the schools funding arrangements for 2024/25, as detailed in the report at pages 11-34 of the agenda pack. A supplementary report had also been circulated which included updates relating to the affordability gap of the mainstream schools National Funding Formula (NFF).

The Forum was advised of the background to the NFF and the Government's funding intentions for 2024/25. The fundamentals principles of the Government's NFF were not changing for 2024/25 and Members were directed to pages 19-20 of the report where the key NFF updates were detailed. It was noted that for the Dedicated Schools Grant (DSG) for 2024/25, the Council was to continue adopting the NFF in 2024/25, subject to affordability. The October 2023 schools census which was used for 2024/25 mainstream schools budgets had continued to see growth in both Free School Meals (FSM) and FSMs Ever 6 with the cost of living challenges being a contributing factor to this.

The Supplementary Paper explained that the overall affordability gap shortfall was £1.459m to adopt the NFF in full including a 0.5% minimum funding guarantee (MFG). The Council was unable to set an affordable formula, the LA would therefore continue to adopt the same principles for 2024/25 when addressing affordability issues of the Schools block. The following steps were applied: to reduce the growth element of Schools block budget by £1.236m, and the remaining £0.223m shortfall was to be addressed through a downward adjustment of 0.072% of the Key Stage Age Weighted Pupil Unit (AWPU) values from the Government's NFF rates in 2024/25. Appendix A also provided a funding comparison of the Government's Notional NFF factors for 2023/24 to 2024/25.

It was reported that the Council had conducted its annual review of the DSG central budgets, and areas of refinements were focused on the demand-led budgets within the High Needs block. The forecast in-year overspend on high needs would need to be met from available DSG reserves.

Consideration was given to the report and during the discussion the following points were recorded:

- The Forum were pleased that Lincolnshire was not yet in a deficit position on its DSG, however the Forum acknowledged the challenges raised about the rise in demand for Special Educational Needs and Disabilities (SEND) places and the forecasted in-year deficit in 2024/25 on the High Needs block .
- High level benchmarking on funding arrangements had been undertaken, along with engagement with other local authorities on ways to mitigate financial challenges. Officers assured Members that the Council would seek to secure a sustainable budget in the medium-term whilst continuing to support children with SEND needs.
- Members acknowledged the significant amount of building work carried out to increase the number of SEND places available within the County and lessen the need

for external places. The significant impact these works had on the budget was noted, with a capital spend of 50% above the original budget for the programme due to school conditions and rising construction costs.

- Officers advised that although the work had been positive in meeting some of the need for places, it was acknowledged that there was a significant demand for SEND places which could not be met by The Building Communities of Specialist Provision programme. Significant work was ongoing to identify the needs of provision across different localities to ensure support is provided in a structured way. Officers noted that a Schools block transfer had not previously been sought to the High Needs block, officers were keen to seek the views of Members regarding this in future meetings, along with several other options to manage need.
- There was no impact from the proposed deduction to the School Growth Fund as officers had reviewed and determined new and existing re-organisation costs for 2024/25 along with including some flexibility to respond to any further re-organisations that may be necessary from September 2024
- Assurance was given that a low-risk, low-impact approach was adopted to the mainstream funding formula to meet the remainder of the affordability gap by the 0.072% reduction to the Key Stage AWPU values.

RESOLVED

1. That the report be noted;
2. That the Council's proposals of continuing to adopt the national funding formula and steps to address an affordability gap be supported;
3. That the disapplication request for the continuation of the primary schools rent factor relating to schools premises within Lincolnshire's current local formula under the exceptional circumstances criteria be agreed;
4. That the proposals relating to a number of centrally held budgets be agreed.

26 EARLY YEARS NATIONAL FUNDING FORMULA

During this item, Tristan Revell declared a personal interest as the Director of a Childcare Centre.

Consideration was given to a report by the Sustainability and Development Manager, which invited the Forum to consider a report which provided a summary of the funding and distribution of the Early Years National Funding Formula and Childcare Reforms for 2024/25 and sought agreement on the Local Authority's proposals relating to the allocation and distribution of the centrally retained budgets. Further details could be found within the report. An updated report had been circulated.

The DfE had published the final budgets on 29 November 2023, which was later than planned. All associated technical notes and operational guidance had been reviewed and used to implement the funding changes for the next financial year.

Consideration was given to the report and during the discussion the following points were recorded:

- The Forum raised concerns over the challenges faced by early years settings as a result of a lack of funding provision, increased costs and recruitment challenges, which were significant and unsustainable.
- Officers recognised the difficulties faced by early years providers and emphasised that the Local Authority was doing as much as possible to support settings, including supporting different business models and cost implications to support and maintain sustainable provision.
- Officers also acknowledged the recruitment and retention pressures and assured Members that they continued to lobby the Government for further funding to support provision.
- Concerns over a lack of sufficiency and deficit of provision were highlighted. The Local Authority were supporting the development of new places and were using funds delivered as part of Childcare Reforms to build on the lack of places where needed.

RESOLVED

1. That the report be noted;
2. That the Local Authority's proposals for centrally retained funding be agreed.

27 ALTERNATIVE PROVISION ARRANGEMENTS

During this item, Josh Greaves declared a personal interest as the Deputy Chief Executive Officer for a trust which delivered Alternative Provision arrangements.

Consideration was given to a report by the Head of Service for Inclusion, which provided a summary of the Alternative Provision (AP) arrangements in Lincolnshire for 2022/23, as detailed in the report at pages 35-44 of the agenda pack.

During the discussion, the following points were recorded:

- Members raised concerns over the frequency of pupil suspensions and the impact this could also have on other pupils' learning, budgets and to mid-year school admissions, particularly with an increase on mid-year admissions for KS4 pupils.
- It was suggested that consideration and reward be given to schools who were more inclusive and accepted pupils despite challenges.
- Members acknowledge the intention of the Fair Access Protocol but highlighted the significant disruption that could be caused as a result.
- Members were advised that mid-year admissions were higher than ever with no real rationale other than school dissatisfaction. Officers acknowledge that work schools were working hard to be as inclusive as possible and recognised the challenges faced within the high needs block.
- The impact that challenging behaviour on staff was also highlighted.
- It was clarified that the data provided within the report was only for Lincolnshire Schools.

- The challenges in getting some families to engage in the exclusions process were emphasised. It was suggested that additional financial and family support would have a positive impact on communities.
- Officers were pleased that Lincolnshire's involvement in the Pathfinder national pilot programme would bring additional funding to enhance and adapt the current system. It was acknowledged that with the right support outcomes were better, however the Local Authority was faced with a challenge to deliver statutory functions as a priority which led to a lack of funding to deliver early intervention works.
- Members requested to see a breakdown of data in terms of gender in future reports, as well as comparisons between high levels of special educational needs compared to the funding offered and achievement and attendance data.

RESOLVED

That the report be noted and the comments made be recorded for consideration.

28 SUPPLEMENTARY TO THE ANNUAL REPORT ON SPECIAL EDUCATIONAL NEEDS AND DISABILITIES (JUNE 2023)

Consideration was given to a report by the Head of Service – SEND, which provided an overview of the up-to-date position in relation to Special Educational Needs and Disabilities (SEND) and additional information that was unavailable when the last Annual Report on SEND was presented to the Forum. The full report could be found at pages 45-54 of the agenda pack.

During the discussion, the following points were recorded:

- A large proportion of the need for SEND provision had been attributed to individuals with autism, which was also impacted by the challenges faced due to delays in diagnosis. It was hoped that the new All Age Autism Strategy would support families and schools with some of the challenges currently experienced. The strategy was now live and progressing in a positive way to support families and adults.
- Members of the Forum acknowledged the serious challenges for SEND needs in early years settings. Officers were working on future proofing schools and workforce development to ensure needs could be met in mainstream settings where possible.
- It was hoped that family hubs could help families in accessing support.
- Assurance was provided that challenges in diagnosis and waiting times were being addressed by the Lincolnshire Integrated Care Board.

RESOLVED

That the report be noted and the comments made be recorded for consideration.

29 ACADEMIES AND TRUST UPDATE

Consideration was given to a report by the Strategic Finance Lead – Children’s Services, which provided an update on the latest position regarding the number of Maintained Schools and Academies. The full report could be found at pages 55-58 of the agenda pack.

During the discussion the following points were recorded:

- As the number of multi-academy trusts was now significantly higher, it was suggested that data be split between multi and single academy trusts in future reports.

RESOLVED

That the report be noted.

30 LINCOLNSHIRE SCHOOLS' FORUM WORK PROGRAMME

The Forum were invited to consider the proposed work programme, as set out at pages 59-62 of the agenda pack.

RESOLVED

That the work programme be noted.

The meeting closed at 3.57 pm



Open Report on behalf of Heather Sandy, Executive Director - Children's Services

Report to:	Lincolnshire Schools' Forum
Date:	18 April 2024
Subject:	Building Communities of Specialist Provision Strategy: Update

Summary:

The purpose of this report is to provide Schools' Forum with an update on the implementation of the Building Communities of Specialist Provision Strategy.

The report summarises the progress made in year 5 of strategic implementation, within the Capital Build Programme and in all supporting system areas.

Recommendation(s):

Schools' Forum is required to:

1. Review and comment on the content of this report and progress made in Year 5 of implementation.
2. Agree receipt of an update on Year 6 of implementation in April 2025.

1. Background

The Building Communities of Specialist Provision Strategy was developed in response to the Department for Education (DfE) requirement of all Local Authorities (LA) to review provision for pupils with SEND in order to ensure that there are sufficient good school places which meet the changing needs of pupils with SEND. The review required local authorities to work in close collaboration with special schools and parent/carers groups to co-produce a strategic plan which delivers sustainable, good quality provision to meet current and future needs.

In November 2018, the Executive granted approval to implement the Building Communities of Specialist Provision Strategy. Implementation commenced in January 2019 with the final school changes being made by Summer 2025.

The strategy is making significant changes to the existing special education provision, creating an integrated and sustainable school system where pupils can attend their nearest special school, confident that their education and health needs can be fully met. The allocated capital investment is improving premises and facilities, enabling each school to offer places to pupils from within their local communities with a wider range of needs. All fourteen special schools will be able to meet 'all **complex** needs' once fully implemented.

The SEND Education Partnership has oversight of strategic implementation to ensure equity of provision and accountability and fairness within the programme.

2. Programme Update

2.1 Capital Programme

The Building Communities of Specialist Provision Strategy commenced implementation in 2019 and will be completed by Summer 2025. This is a delay from the original completion date of late 2024 due to design and procurement challenges on three individual schemes within the programme; these issues have now been addressed and the timeline amended. (See Appendix A).

2.2 Progress Overview

The key milestones for the capital programme met in this reporting period are:

- Official Completions:
 - Boston Endeavour Academy
 - The Eresby School
 - St Bernard's School
 - Tulip Academy (Waterside Campus)

- Official Opening Ceremonies:
 - St Christopher's Primary School
 - Tulip Academy (Waterside Campus)
 - St Bernard's School
 - The Eresby School

- Continuation of works, including demolition of main block, at St Christopher's Secondary site.
- Continuation of works, including full school rebuild, at St Lawrence School.
- Completion of works to St Francis School car park and enabling condition works to ensure building is fit for main works.
- Design progression for St Francis School and Gosberton House Academy.

2.3 Risk Summary

The programme remains subject to on-going risks around inflationary pressures and site conditions as the construction industry settles after a period of economic instability. The economic climate has been severely impacted by a range of challenges, which have subsequently impacted the delivery and cost of the SEND Capital Programme.

Corporate Property continue to monitor inflationary rises within the construction industry and provide Children's Services with regular reports on the impact this is having on the special school's capital programme. The current programme budget of £101.8m is expected to remain sufficient to complete the whole SEND programme.

2.4 Progress by Scheme

Boston Endeavour Academy

Boston Endeavour Academy was the first all complex needs special school to open as part of this programme having been officially handed over to the Community Inclusive Trust and welcoming its first pupils on 6th September 2021. This new school is now accommodating 147 pupils in line with the planned expansion programme.

The school provides sixteen classrooms, specialist teaching spaces including science, technology, ICT and art, and a hall. The school also benefits from a hydrotherapy pool, sensory and soft playrooms and dedicated therapy spaces. Externally, there are hard and soft surfaced play areas and sensory, horticulture and wildlife areas and a sensory courtyard which is enjoyed by staff and pupils throughout the school day.

The Willoughby Academy, Bourne

All construction work has now been completed and handover to the Priory Trust took place on 10th December 2021.

Due to the capital investment programme, the capacity of this school has increased from 80 to 141, in line with the agreed phased increase.

The new accommodation block provides six classrooms, hall, specialist secondary teaching spaces including science and technology, as well as small group spaces and hygiene facilities. Remodelling work to the existing school has provided additional therapy spaces and a medical inspection room to ensure the school can offer, in conjunction with health providers, a robust health offer to all children and young people with SEND in the local area.

The Eresby School, Spilsby

All construction work has now been completed and handover to the David Ross Education Trust took place on 9th May 2022. Phased increase of the additional sixteen places has taken place, in accordance with the agreed expansion approach. The official opening of the new block took place on 26th May 2023.

The new accommodation block provides improved facilities including five classrooms, hall, ICT and science spaces as well as small group rooms, hygiene facilities and staff and meeting spaces. The remodelling work to the existing school has provided a design/technology and art room, physiotherapy space, visiting professional/therapy space, parents' room, a hygiene suite, a disabled WC and staff/administration spaces.

St Bernards School, Louth

All construction work has now been completed and handover to the Lincolnshire Wolds Federation Trust took place on 12th September 2022. The agreed expansion plan supported an increase of twelve additional places made available during the 2022/23 academic year. The official opening took place on 9th June 2023.

The new block and remodelling has provided enhanced facilities including six classrooms, hall, specialist secondary teaching spaces including science and technology, as well as small group spaces, therapy and hygiene facilities. Enhanced facilities were also provided to The Maples residential facility.

With regards The Maples residential facility, it is intended this will become part of the council's overnight short breaks offer as it amends its scope of provision. Preparation for Adulthood will become part of the special school's day curriculum offer, with overnight short breaks provision at The Maples extending to a full-time 3-bedded facility. This has been approved by the council's Executive Member and will be implemented from September 2024.

Tulip Academy, Spalding

In line with the strategy, The Priory School and The Garth School successfully merged to become Tulip Academy on 1st September 2022. All construction work at the Springview Campus was completed in 2021, as a self-delivery scheme, and the Waterside Campus completed in April 2023. The official opening for the new block on the Waterside Campus took place on 7th July 2023.

The development of Tulip Academy has enabled capacity to increase to 212 places, in line with the agreed phased expansion. The Waterside Campus is currently subject to further development as part of the DfE's School Rebuilding Programme.

Lincoln St Christopher's School

Handover of the new primary school on Skellingthorpe Road, Lincoln took place on 3rd April 2023, with the official opening event on 23rd June 2023. The primary school can now accommodate 130 pupils and has high-quality, state of the art facilities including a hydrotherapy pool.

The secondary site is currently under construction with a proposed handover planned for October 2024. Demolition of the main school has been completed along with the opening of the remodelled Block 1, enabling the school to continue offering an education to pupils during the construction period.

Once all works are completed St Christopher's School will be able to accommodate 333 pupils increasing Lincoln City and surrounding area's special school provision by 111 places. This increase in pupil numbers has already commenced with capacity at the primary site.

Horncastle St Lawrence School

The rebuilding of St Lawrence School is due for completion by early May 2024. The new school has been handed over and the external works to transport arrangements and formal play space is in the final phase of construction. The new school can accommodate a further 80 places which have been filled in line with the council expansion plan.

The new school provides seventeen classrooms, three of which have been specifically designed for PMLD pupils with hoists and sensory corners, a new hall and studio allowing the school to offer rebound therapy, physical education and dining for all pupils, therapy spaces including soft play, sensory and physiotherapy, life skills and social recreation spaces and calm and group spaces. The new block also provides hygiene facilities, a staff workspace, offices and meeting rooms.

The whole school site has been redesigned to provide improved drop off and pick up facilities for the pupils, with increased parking provision for staff and visitors ensuring all vehicles can be accommodated on the school site. Reorganised and improved outdoor play spaces include a sensory garden, horticulture, formal and informal sport pitches and zones for trim trails and outdoor exercise equipment.

Grantham Additional Needs Federation: Ambergate Sports College and The Sandon School

Construction of the Ambergate site completed early in the programme and pupils are enjoying the much-improved facilities.

Due to the successful Condition Improvement Fund (CIF) application granted by the Education Skills Funding Agency (ESFA) a new Hydrotherapy pool has been built on the Sandon school site, as a condition of the funding allocation. The Community Inclusive Trust have successfully self-delivered this project with assistance and funding from the Council. Both schemes have been completed and the schools have merged to form Grantham Additional Needs Federation (GANF), as of 1st January 2024.

Further expansion of the Ambergate site continues to be considered, with feasibility being undertaken on the West Grantham Church of England Primary Academy – Upper School which is now empty as the school has relocated to the lower school site. As this site is located adjacent to Ambergate Sports College, there is the option to developing this site to provide additional capacity for the Grantham area in the future. Any further decisions relating to this expansion will be subject available funding and Executive Approval at an appropriate time.

Lincoln St Francis Special School

Feasibility and design have commenced to provide a special school which can meet a wider range of needs for 150 pupils. Construction of the improved parking area has been completed, along with condition works to ensure the building is fit for development.

Delays to this scheme have arisen due to the need to change preferred contractor during the design process. The original contractor submitted costings beyond budget viability, so the scheme was retendered, and a new contract awarded. Final design has been completed for this scheme and costings due for consideration in May 2024.

Gosberton House Academy

Feasibility and design have commenced to provide a special school which can meet a wider range of needs. As with St Francis, there has been a delay to this scheme due to the need to change preferred contractor during the design process. The original contractor submitted costings beyond budget viability, so the scheme was retendered, and a new contract awarded. Final design has been completed for this scheme and costings due for consideration in May 2024, with submission for Executive Approval in July 2024.

2.5 SEND Support Structures

School Reorganisation Policy and Budget

A SEND School Reorganisation Policy is in place to ensure all special schools, subject to reorganisation, receive equitable and fair funding to meet all reasonable additional costs. It provides a formalised approach to the funding of special school reorganisations to support the Council's statutory duty to provide sufficient school places for the children of Lincolnshire. It addresses situations when, as part of its strategic planning of school places, the Council asks a school / academy to expand and take in additional pupils above their agreed capacity temporarily or expands permanently.

Through the development and implementation of this policy, it has been possible to provide a fair and standardised level of funding during this transition period to those schools that the Council wishes to expand permanently and this applies of both maintained and academy special schools.

The policy takes into consideration all circumstances whereby schools are faced with additional costs such as removal costs, loose classroom equipment, IT resources and other such expenditures to ensure they can meet all complex needs for an increased number of pupils.

Through support received by the Schools' Forum, the Council earmarked £2.000m from the Dedicated Schools Grant reserves underspend to fund the school reorganisation policy during the transition phase. Additional place funding will be supported through the earmarked funding and the High Needs block.

The £2.000m commitment will support the following:

- Fixtures and fittings for the fifty-five new classroom spaces in accordance with the special school’s reorganisation policy.
- New building space / loose furniture through the SEND capital programme, such as installation of new sensory and soft playrooms, medical intervention spaces and specialist teaching facilities.
- Additional recruitment costs.
- Ad hoc Decant costs.
- A commitment to support workforce development for the sector that is to be rolled out to mainstream schools also.
- The remainder will fund the increase in banded funding to support the intakes of additional pupils. This requirement will be met through a blended approach of remaining monies from the reserve and High Needs block funding.

All schools have either received their full allocation or have been informed of their initial allocation if their building work is not yet complete.

Table 1: Committed School Reorganisation Expenditure (to date)

	Total Costs (all schools to date)
Classrooms	£523,875
Loose Furniture	£594,847
Recruitment	£118,190
Relocation / Decant	£79,060
Pupils Numbers	£178,909
Legal	£6,243
Workforce Development	£168,575
	£1,669,698

2.6 Workforce Development

The workforce development learning platform was commissioned on 10th February 2022 via a Public-to-Public Collaboration Agreement, under Regulation 12(7) Public Contracts Regulations 2015 between Lincolnshire County Council and Lincolnshire Wolds Federation as lead agency for the SEND Alliance.

Agreements are in place between the SEND Alliance and Lincolnshire Safeguarding Children’s Partnership to utilise their existing platform and all requirements and regulations regarding Information Assurance and Governance have been addressed to ensure compliance.

The service has currently uploaded 16 training modules that are free to access for all Lincolnshire Schools and parents and carers. The content has been created by SEND sector experts and quality assured by Leaders in the industry. Alignment of the resources developed by the Service with an existing trusted learning resource management system

(Virtual College) used by the Lincolnshire Safeguarding Children Partnership (LCSP) offers the most efficient and effective method to deliver the partners' shared aims, objectives and outcomes under the Building Communities of Specialist Provision strategy.

The current contract was awarded for 5 years, starting in 2022. The first year was for development of content. The second year focusing on marketing and engagement for SEND Schools, Mainstream Schools and parents and/or carers.

The workforce development platform was extended to parents and carers in October 2023 and this has been well-received within the SEND community. Access to this platform for parent/carers is through membership of the Lincolnshire's Parent Carer Forum (LPCF) who have worked closely with the workforce development providers to market the provision to families. Feedback from the parent and carer community who have engaged in the learning have rated the project at 92% Good or Very Good.

Creation and release of the content to SEND and Mainstream Schools has been successful with 302 Schools actively engaging with the learning platform and 6,847 modules being completed with a feedback rating of 85% Good or Very Good overall.

The following graphs identify how the number of modules completed each week continues to rise as the project gains momentum:

Table 2. Cumulative Modules

This shows that the number of modules completed (blue line) has continued to rise above the trend line (green dotted line) for the past 6 months.

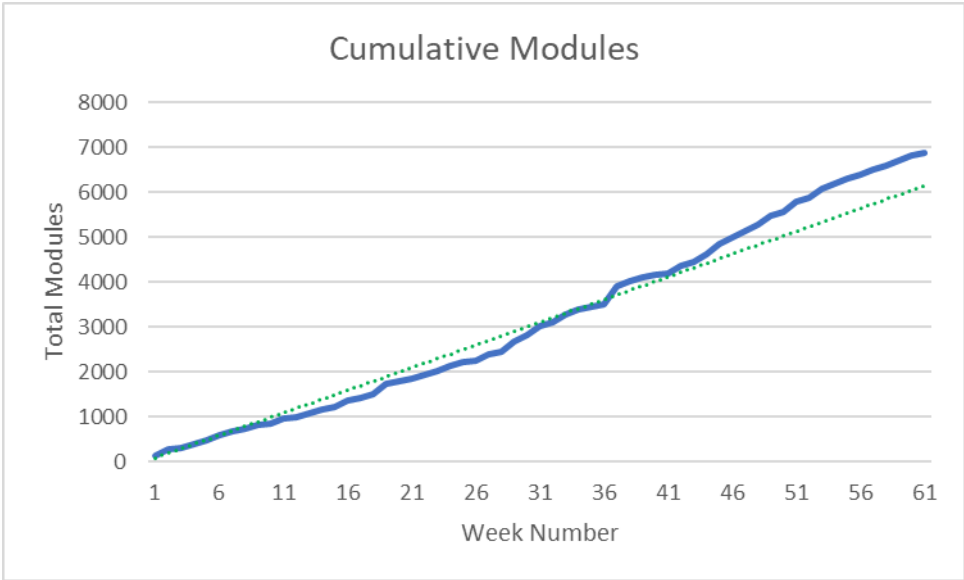
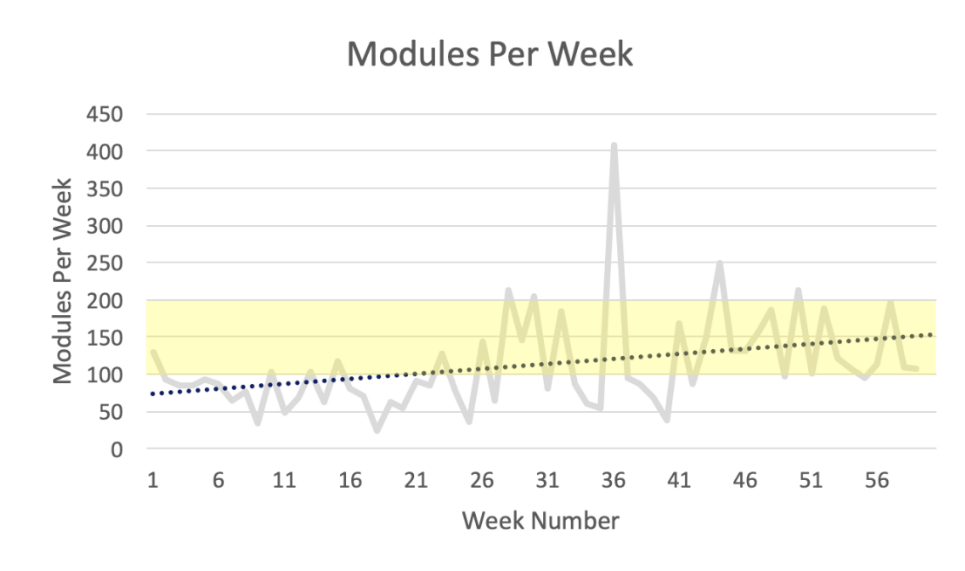


Table 3. Modules Per Week

This trend is also apparent in the Modules Per Week graph. The highlight zone shows that the project regularly has 100+ modules completed per week and the trend line continues to rise.



The whole SEND workforce development project is still relatively new and has been released in phases. This means some schools have only had knowledge of its existence for a year, and although the engagement figures are positive, with good engagement from 83.57% of schools, there are some schools only just becoming aware of the material. Further marketing is planned by the workforce development providers.

2.7 Health Offer

In order for all special schools to meet all complex needs, it is imperative that each school can meet the needs of children and young people with more complex medical conditions. At present, the only school with an on-site specialist nursing team is Lincoln St Francis previously the designated profound and multiple learning disability/physical disability school for the county, whilst others have a varied offer when it comes to meeting the needs of children and young people with medical needs. In order to enable attendance at their local special school, there needs to be a robust and equitable health offer available to all children and young people.

In this reporting period, a new task and finish group has been established with membership from the Integrated Care Board, United Lincolnshire Hospitals Trust and Lincolnshire County Council, to drive forward the development of a county-wide system where all special schools have the staffing, skills and confidence to meet the needs of children and young people with the most complex medical needs and those who are long-term ventilated. A proposed model of provision has been developed and submitted as a Case for Change to the Children and Young People’s Integrated Transformation Board, with approval to proceed to a Business Case granted. This Business Case is in development and will be put forward for approval in the coming months.

2.8 Specialist Equipment

In order to ensure the most cost-effective use of specialist medical and therapy equipment, all special schools have now joined the existing contractual arrangements held by the Council with specialist equipment providers. As part of the Lincolnshire Community Equipment Service, special schools are able to order directly through the Council's contractual arrangements, providing better value for money. If specialist equipment is deemed to be required by a therapy professional (such as Physiotherapist or Occupational Therapist) this will be prescribed and the school can order direct. They receive monthly invoices for the equipment they order, and, on its return, the school receive a refund for the cost of the equipment. This contract also covers the servicing and maintenance of specialist equipment within the school.

It has been another busy year for the community equipment service with the contracted provider, NRS Healthcare, conducting nearly 900 activities across all special schools up to the end of March 2024. There has been a spend of just over £44k for this financial year, with £7.8k spent on routine servicing, with the remaining £37k on the delivery and collection of new and replacement equipment.

The service has again received positive feedback from all participating schools, who have reported substantial savings in all service aspects. Schools are experiencing a 30% to 70% reduction in equipment maintenance costs compared to the previous provider, with additional long-term savings due to the procurement of new equipment at significantly lower rates. For instance, a previous provider charged schools £396.00 annually for hoist servicing; the current provider cost is just £50.00 per year. Further examples of the savings which schools have achieved this year include:

- Provider A quoted a school £89 for a chair inspection and basic repairs, but NRS completed the same task for just £10.50.
- Provider B quoted a school £149 for a visit and repair of a ceiling track hoist, whereas NRS charged only £10.50.

The year ahead will see the start of a large project at St Francis to install 14 new ceiling track hoists in the refurbished classrooms. LCES are also working with Children's Commissioning Team to expand the contract to the St Francis PD Outreach equipment. From April 2024 the wheelchair service will be managed by the LCES team, with clinics being held in schools to minimise disruption to children. Consultations have already taken place with parent groups for feedback on the existing service.

3. Conclusion

As the Building Communities of Specialist Provision Strategy reaches the final year of its implementation, focus will turn to the outcomes expected to be delivered by this significant investment. An increase of 527 places in the special school estate will enable the council to continue to meet its statutory duty of sufficient school places for those with SEND. However, this strategy has been implemented in a period of unprecedented growth

in the need for SEND school places, both nationally and locally. A recent report to Schools' Forum from LCC's SEND Service outlined the following:

"In 2022 there was a 9% increase nationally in the overall number of EHC Plans (from 2021) whilst in Lincolnshire the increase was lower at 6.5%. Throughout 2023, Lincolnshire experienced a further **7.8% increase** in the number of currently maintained EHC Plans from 2022.

The number of *new* EHC Plans issued in 2022 increased by 7% nationally whilst in Lincolnshire there was a 1.02% *decrease* in the number of *new* EHC Plans. In 2023 Lincolnshire has issued a further 1073 new EHC Plans which is a **30% increase** on the number of new Plans issued in 2022."

(Lincolnshire County Council Schools Forum Report: Supplementary to the Annual Report on Special Educational Needs and Disabilities June 2023, 18th January 2024)

Whilst the council continues to complete the £101m capital programme that has resulted in the modernisation of Lincolnshire's 'all needs' Special Schools, including an extensive range of new buildings as well as refurbished premises, the places are being filled as quickly as they are made available. There is also a risk to the integrity of the strategic commitment to educate children and young people with SEND within their community and *as close to home as possible*. The greater the distance children have to travel, the more burden it puts on them and their families as well as the significant pressure on the Council's Home to School Transport Budget.

Children's Services strongly believes this capital infrastructure investment will not only achieve greater outcomes for Lincolnshire pupils, but will also positive impact on the Council's financial position in the long-term, both in terms of the High Need's block and Home to School Transport Budget.

4. Consultation

a) Risks and Impact Analysis

As the capital programme progresses towards completion, financial risk decreases as only two schemes are still to be finalised and fully costed. Realignment of the budget to include DfE capital allocation spanning 2022-2024 has assured the completion of the programme and addressed ongoing risks relating to increasing inflation.

The revenue allocation for schools reorganisation is well managed and projections indicate the allocated funding will be sufficient to resource all settings within the programme.

Decision making for the strategy is based on a foundation of sound governance with multiple opportunities for scrutiny and challenge. This Council led programme has robust project management with strong key stakeholder involvement, spanning both Children's Services and Corporate Property directorates.

All capital schemes are subject to scrutiny by Children and Young People Scrutiny Committee prior to approval by the Council Leader, before main works contracts can be progressed. This ensures all schemes are subject to enhanced scrutiny considering suitability and value for money.

The SEND Strategy Governance Board, chaired by the Deputy Leader of the Council and Executive Portfolio Holder, reviews each scheme on a bi-monthly basis to monitor progress and any emerging risk issues.

As a collaboratively developed strategy, the SEND Education Partnership has oversight of strategic implementation. It provides the rigorous review of the programme, strategic leadership and is accountable for risk management and monitoring progress.

Corporate Property also undertake rigorous and regular reviews of the Capital Programme with Monthly Programme Board meetings with the Assistant Director, monthly individual Project Review Board, fortnightly Project 'core team' meeting with Head of Service and fortnightly technical team meeting with Head of Service.

5. Appendices

These are listed below and attached at the back of the report	
Appendix A	Special Schools Capital Programme Timeline April 2024

6. Background Papers

The following background papers as defined in the Local Government Act 1972 were relied upon in the writing of this report.

Document title	Where the document can be viewed
Building Communities of Specialist Provision: Together in Lincolnshire	Building communities of specialist provision – Overview - Lincolnshire County Council

This report was written by Eileen McMorrow, who can be contacted on 07780 617884 or Eileen.mcmorrow@lincolnshire.gov.uk.

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Open Report on behalf of Martin Smith, Assistant Director for Children's Education

Report to:	Lincolnshire Schools' Forum
Date:	18 April 2024
Subject:	Academies and Trust Update

Summary:

The purpose of this report is to provide information on the latest number of academies and pupils in academies, and academy trusts.

Recommendation(s):

The Schools' Forum is asked to note the contents of this report.

1. Background

The Schools' Forum asked for an update to be provided to each meeting on the number of academy conversions.

This is the position as at the 1 March 2024. The pupil figures are based on the October 2023 census data (i.e. the latest published). The national academy trust data is the latest available from "Get Information About Schools".

Since the effective date of the last report (1 January 2024) two schools have converted to academy status. Wrangle Primary Academy is a converter academy and joined the University of Lincoln Academy Trust on 1 March 2024, and Skegness The Richmond Primary Academy became an academy sponsored by The David Ross Education Trust, on 1 March 2024. This means that 43.4% of primary schools in Lincolnshire are now academies and that 54.6% of primary aged pupils attend academies.

Current Status of All Lincolnshire State Schools

	Schools		FTE		
Nursery					
All	5		266		
Maintained	5	100.0%	266	100.0%	
Academy	0	0.0%	0	0.0%	
Primary					
All	281		55,778		
Maintained	159	56.6%	25,154	45.1%	
Academy	122	43.4%	30,625	54.9%	
Secondary					
All	54		49,682		
Maintained	2	3.7%	2,115	4.3%	
Academy	52	96.3%	47,567	95.7%	
Special					
All	17		2,157		
Maintained	5	29.4%	685	31.7%	
Academy	12	70.6%	1,472	68.3%	
Alternative Provision					
All	5		209		
Maintained	0	0.0%	0	0.0%	
Academy	5	100.0%	209	100.0%	
Total					
All	362		108,092		
Maintained	171	47.2%	28,219	26.1%	
Academy	191	52.8%	79,873	73.9%	

Digby Church of England School, Willoughby St Helena's Church of England Primary School, Sutterton Fourfields Church of England School, Gedney Hill Church of England VC Primary School and Cowbit St Mary's (Endowed) Church of England Primary School have still not yet had trusts confirmed. Helpringham School has applied to become an academy and to join Voyage Education Partnership. None of the aforementioned schools yet have target dates so the situation in six months currently appears to be the same.

Projected Six Month Status of All Lincolnshire State Schools

	Schools		FTE		
Nursery					
All	5		266		
Maintained	5	100.0%	266	100.0%	
Academy	0	0.0%	0	0.0%	

Primary				
All	281		55,778	
Maintained	159	56.6%	25,154	45.1%
Academy	122	43.4%	30,625	54.9%
Secondary				
All	54		49,682	
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Total				
All	362		108,092	
Maintained	171	47.2%	28,219	26.1%
Academy	191	52.8%	79,873	73.9%

The University of Lincoln Academy Trust now has seven academies, with the addition of Wrangle Primary Academy, and the David Ross Education Trust now has nine academies with the addition of Skegness Richmond Academy.

Community Inclusive Trust have reduced their number of academies with the merger of Grantham Ambergate School and Grantham Sandon School to form the Grantham Additional Needs Fellowship, based on the two campuses.

	Total	FTE Pupils
1 Lincoln Anglican Academy Trust	16	2928
2 The Priory Federation of Academies	13	7299
3 Community Inclusive Trust	11	2106
4 Infinity Academies Trust	10	2350
5 The David Ross Education Trust	9	3138
Voyage Education Partnership	9	3720
7 Our Lady Of Lourdes Catholic Multi-Academy Trust	8	1958
8 Greenwood Academies Trust	7	2546
Keystone Academy Trust	7	2095
University of Lincoln Academy Trust	7	3114
Wellspring Academy Trust	7	1121

There are now thirty-five active multi-academy trusts operating within Lincolnshire and a total of 156 Lincolnshire academies that are members of multi-academy trusts. This

represents 81.7% of all Lincolnshire Academies. Thirty-five (18.3%) of Lincolnshire academies are single-academy trusts and are not members of multi-academy trusts. Eight multi-academy trusts have just one Lincolnshire academy as a member; two of these are single Lincolnshire academy multi-academy trusts. The other six also have academies that are not within Lincolnshire. Six multi-academy trusts have two academies; three of these trusts are currently based entirely within Lincolnshire. There are forty-four academy trusts in Lincolnshire that have less than four schools, including single academy trusts.

	Schools		FTE	
Primaries				
Schools in single-academy trusts	16	13.1%	4795	15.7%
Schools in multi-academy trusts	106	86.9%	25829.6	84.3%
Secondaries				
Schools in single-academy trusts	18	34.6%	18933	40.4%
Schools in multi-academy trusts	34	65.4%	27976	59.6%
Other				
Schools in single-academy trusts	1	5.9%	36	2.1%
Schools in multi-academy trusts	16	94.1%	1645	97.9%
	191		79214.6	

The largest academy trusts nationally that operate within Lincolnshire are Academies Enterprise Trust (Fifty-seven Academies, two in Lincolnshire), Delta Academies Trust (Fifty-seven Academies, one in Lincolnshire), Greenwood Academies Trust has thirty-seven academies, seven in Lincolnshire, Our Lady Of Lourdes Catholic Multi-Academy Trust has eight Lincolnshire Schools and has thirty-six academies nationally and The David Ross Education Trust has thirty-five, nine within Lincolnshire.

	National	Lincs
1 Academies Enterprise Trust	57	2
Delta Academies Trust	57	1
3 Greenwood Academies Trust	37	7
4 Our Lady Of Lourdes Catholic Multi-Academy Trust	36	8
5 The David Ross Education Trust	35	9

2. Conclusion

The Schools’ Forum is asked to note the contents of the report.

3. Consultation

a) Risks and Impact Analysis

The academy conversion process is fully understood and has been in place for a number of years. There are services funded by the number of maintained school pupils (e.g. de-delegation services). Future anticipated funding levels are considered through the annual detailed budget setting exercise.

The actual split between Local Authority maintained and academies has no financial risk to the Council from the Dedicated Schools Grant schools delegation budget perspective.

4. Background Papers

No background papers as defined in the Section 100D of the Local Government Act 1972 were relied upon in the writing of this report.

This report was written by Ady Clarke, who can be contacted on 01522 553216 or ady.clarke@lincolnshire.gov.uk.

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Agenda Item 7

18 April 2024 – Virtual Meeting

Building Communities of Specialist Provision: Update	Eileen McMorrow	To provide the Schools' Forum with an update on the SEND Strategy
Academies and Trust Update	Mark Popplewell	To provide the Schools' Forum with an update on the latest position regarding the number of Maintained Schools and Academies and the pupils in them
Lincolnshire Schools' Forum – Work Programme	Emily Wilcox	To provide the Schools' Forum with an opportunity to discuss potential items for future meetings, which will be subsequently, included on the Work Programme

13 June 2024 - Virtual Meeting

Election of Chairman		
Election of Vice-Chairman		
Review of LSF Constitution and Membership	Mark Popplewell	For the Schools Forum to consider and update its Rules of Operation
Section 251 Budget Statement 2024/25	Elizabeth Bowes	To provide an update to the Schools' Forum regarding the budget statement for 2024/25
Annual Report - Special Educational Needs	Sheridan Dodsworth	To receive an annual report on Special Educational Needs
Annual Report on Early Years	Geraldine O'Neill	To receive an annual report on Early Years' Service
Early Years National Funding Formula – update (rollout)	Geraldine O'Neill	To provide an update on the early years national funding formulas for 2024/25
Sector Led Approach for School Improvement	Geraldine Willders	To provide the Schools' Forum with an update on the Sector Led Approach for School Improvement
Academies and Trust Update	John O'Connor	To provide the Schools' Forum with an update on the latest position regarding the number of Maintained Schools and Academies and the pupils in them
Lincolnshire Schools' Forum – Work Programme	Emily Wilcox	To provide the Schools' Forum with an opportunity to discuss potential items for future meetings, which will be subsequently, included on the

		Work Programme
Future Meeting Dates	Emily Wilcox	To provide the Schools' Forum with an opportunity to agree future meeting dates.

10 October 2024 – Virtual Meeting

National Funding Formula for schools - update 2025/26	Elizabeth Bowes	To provide the Schools' Forum with an update on the mainstream school funding
De-delegation of Maintained Primary Schools Budgets (2025/26)	Mark Popplewell	To seek approval from the maintained primary school representatives approval to the Local authority's proposals
Revised Schools Budgets 2024/25	Mark Popplewell	To provide information on the revised Schools Budget for 2024/25 and to seek support
Alternative Provision Arrangements	Kate Capel	To provide an update on how alternative provision arrangements are working
Academies and Trust Update	John O'Connor	To provide the Schools' Forum with an update on the latest position regarding the number of Maintained Schools and Academies and the pupils in them
Lincolnshire Schools' Forum – Work Programme	Emily Wilcox	To provide the Schools' Forum with an opportunity to discuss potential items for future meetings, which will be subsequently, included on the Work Programme

16 January 2025 – Lincolnshire County Council County Offices (in person)

School Funding Arrangements 2025/26	Elizabeth Bowes	To provide an update on school funding arrangements for 2025/26
Early Years National Funding Formula	Geraldine O'Neill	To provide a summary on the early years national funding formula for 2025/26, and to seek agreement relating to the allocation and distribution of the centrally retained budgets
Sector Led Approach for School Improvement	Geraldine Willders	To provide the Schools' Forum with an update on the Sector Led Approach for School Improvement
Academies and Trust Update	Mark Popplewell	To provide the Schools' Forum

		with an update on the latest position regarding the number of Maintained Schools and Academies and the pupils in them
Lincolnshire Schools' Forum – Work Programme	Emily Wilcox	To provide the Schools' Forum with an opportunity to discuss potential items for future meetings, which will be subsequently, included on the Work Programme

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